Project **M**anagement **O**ffice

Implementation and Transition Plan
for
Grants, Contracts, and Loans
Management System

Revision #1.2

Office of Financial Management

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Introduction

This document describes the approach and processes the Grants, Contracts, and Loans Management (GCLM) system project will follow to implement GCLM for agreements management in the Departments of Ecology (ECY) and Community, Trade and Economic Development (CTED).

Implementation Objectives

Successful implementation and transition will assure:
- Providers are aware of the GCLM implementation plans and how it will affect them.
- ECY and CTED agreements management staff are aware of the GCLM implementation plans and how it will affect them.
- ECY and CTED agreements management staff are trained in GCLM as needed. (The Training Plan is a separate document.)
- The production GCLM system is configured consistent with the system that successfully passed user acceptance testing.
- The production GCLM database contains sufficient and accurate "seed" data, e.g., validation and selection values, to allow both external providers and internal agency staff to manage agreements.
- The GCLM database contains agreement data from ECY and/or CTED agreements databases, as ECY and CTED staff have arranged and loaded via a data migration utility.
- ECY and CTED agreements management staff may continue their daily agreements management work through GCLM implementation with minimal interruption.
- Project objectives are met.

Implementation Approach

Budget

No additional costs will occur during implementation.

Schedule

The GCLM project has been divided into three phases:
1. A high level fit/gap phase during which the project team evaluates the O&PEN application and how it fits Washington State's requirements.
2. Pilot configuration of GCLM for agreement management will use Ecology's Water Quality Program and CTED's Housing Division. Each program will include more than one agreement opportunity.

3. Configuration and roll-out of GCLM for agreement management for all ECY and CTED programs.

Production implementation of GCLM will take place at the end of phase 3. A partial production implementation may also take place at the end of phase 2, depending on the decision of the project stakeholders. Following phase 2 there will be a choice of:
- Implementing GCLM for both the ECY and the CTED pilot programs at the end of the first roll-out phase, or
- Implementing GCLM for one of the pilot programs at the end of the pilot phase, or
- Implementing GCLM for both the ECY and the CTED pilot programs at the same time as other ECY and CTED programs: at the end of the third phase.

Further details of an implementation schedule will be decided after the 45-day evaluation period has successfully passed.

Roles and Responsibilities

Executive Sponsor / Executive Steering Committee
Sadie Rodriguez-Hawkins, Jan Marie Ferrell, Polly Zehm
- Reviews and approves high level implementation schedule, including programs
- Reviews and approves the implementation acceptance recommendation
- Ensures any additional resources, as needed, are available

Project Manager
Doug Beam
- Approves the detailed implementation schedule
- Approves the implementation acceptance criteria
- Recommends acceptance and forwards to the Executive Steering Committee
- Approves specifications for the data migration utility
- Assigns any issues arising from the implementation schedule
- Assigns any risks arising from the implementation schedule
- Communicates with stakeholders on implementation plans and issues
- Assists in securing additional resources, if necessary
- Makes necessary updates to project plan

Product Manager
Owen Barbeau
- Recommends and updates the implementation schedule
- Forwards recommended and updated implementation schedule to Project Manager
- Plans for each implementation
- Evaluates and decides readiness for deployment

- Assists ECY and CTED staff with data migration
- Develops implementation checklist
- Assures all tasks on the implementation checklist are successfully completed
- Prepares communications and other documentation prior to implementation
- Evaluates implementation
- Documents results of implementation including lessons learned
- Forwards issues and changes to Project Manager
- Leads Implementation Team

Implementation Team
Owen Barbeau, Liz Saylor, Jason Henderson, Christi Johnson, Travis Nation, Rick Castro, Sierra Systems, OGMA Consulting
- Assists Product Manager developing and updating the implementation schedule
- Develops implementation acceptance criteria
- Works with ECY and CTED staff to get ready for deployment
- Completes and assists with tasks on the implementation checklist
- Assists the Product Manager with recommendations and documentation on implementation
- Assists developers with specifications for the data migration utility
- Assists Product Manager with agencies' data migration
- Assists the Product Manager documenting the results of the implementation
- Makes recommendations to Project Manager

Developers
Sierra Systems and OGMA staff, Travis Nation, OFM ER staff to be determined
- Develops specifications for the data migration utility
- Develops and tests data migration utility
- Works with OFM Technical Infrastructure staff to assure compatibility with OFM environment and standards
- Assists OFM Technical Infrastructure staff with installation and migration of system and data
- Updates system documentation based on implementation

OFM Technical Infrastructure staff
Network Services, Data Administration, AFRS Group, Enterprise Reporting Group, Other state staff to be determined
- Assures ER changes needed for GCLM implementation are made and tested
- Assures AFRS changes needed for GCLM implementation are made and tested
- Assures GIS services needed for GCLM implementation are made and tested
- Installs/migrates system and database to production
- Ensures system and database are compatible with other systems and OFM standards

Customer Management

The Communications Plan describes the higher level objectives and strategies for making sure all stakeholders are informed and prepared for implementation.

The GCLM Implementation Team will work with the GCLM Product Manager to develop a detailed customer management strategy after the 45-day evaluation period has successfully passed.

Migration or Cutover Strategy

The GCLM Implementation Team will work with the GCLM Product Manager to develop a detailed migration or cutover strategy after the 45-day evaluation period has successfully passed.

Documentation

Documentation will be developed as implementation progresses and will be stored on the project SharePoint site.

Turnover

The Implementation Team and Developers will be working together throughout the project to assure that the OFM team has knowledge of the system and how to administer it. Knowledge transfer will be an item on the implementation checklist.

Implementation Acceptance

The Implementation Team will develop acceptance criteria for implementation after the 45-day evaluation period has successfully passed.

Acceptance

We, the undersigned project members, have reviewed this document and approve its contents. Acceptance signatures are contained in a separate document.

Name and Title	Signature	Date
Sadie Rodriguez-Hawkins Executive Sponsor		
Jan Marie Ferrell Executive Steering Committee		
Polly Zehm Executive Steering Committee		
Lynne McGuire Business Manager		
Doug Beam Project Manager		

Appendix A: Revision History

Revision	Date	Author	Description of change
1.0	02/26/2008	Doug Beam	Created
1.1	3/24/2008	Doug Beam	Updated with Sierra Systems suggestions.
1.2	7/28/08	Anwar Wilson	Changed Susan Dodson to Owen Barbeau.